

iMATCH Training

Basic Features

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About iMATCH

- ▶ Direct Certification system – used by SFAs to identify students eligible for free meal benefits via assistance programs (SNAP, TANF)
- ▶ System compares enrollment information from Infinite Campus and DSS data nightly
- ▶ Identical entries between the two files are matched, and listed on the corresponding school district list

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Software Support

- ▶ Windows 7 will not be supported in SY17–18
- ▶ Windows 8 mainstream support will end 1/9/18
- ▶ Cybersoft may have difficulty in providing technical assistance for unsupported operating systems
- ▶ Provide communication to the technology coordinator

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Features to Cover

- ▶ Obtaining Direct Certification List
- ▶ Direct Certification Notification Letters
- ▶ New Match Notification Email to SFA
- ▶ Determine daily change of Direct Cert List
- ▶ Direct Certification by school site
- ▶ File Search feature
- ▶ How to use the Potential Matches tab

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Obtaining the Direct Certification List

- ▶ Student Eligibility
- ▶ Administration
- ▶ DC Matching
- ▶ Matched – All Match Methods selected

The screenshot shows the 'DC Matching' interface. On the left is a navigation menu with items: Student Eligibility (1), Applications, Administration (2), Direct Approvals, DC Matching (3), Grace Period Letters, Patrons, Students, Application Reports, and Eligibility Reports. The main area has tabs: Potential Matches, Sibling Search, Matched (4), and File Search. Below the tabs are search filters: Academic Year (2016 - 2017), Site Code, Site, SSN / Student ID, Last Name, First Name, Grade, Status, Case Number, Match Date From, Match Date To, Match Method (5) with checkboxes for System, Sibling, Manual, and Transfers, and buttons for Apply and Reset. At the bottom, there are checkboxes for 'Exclude Previously Notified Students' and 'Exclude Previously Free Students', and buttons for 'Notify All', 'Notify', and 'Export' (6).

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Obtaining the Direct Certification List

- ▶ Export allows to save full list in Excel format

Matched Students												<input type="checkbox"/> Exclude Previously Notified Students		<input type="checkbox"/> Exclude Previously Free Students		Notify All	Notify	Export
ID	Last Name	First Name	Site	Grade	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print							
> 030280375	Omland	Austin	001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017									
> 052364178	Heckler	MaKayla	001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017									
> 053081783	Alston	Kody	001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017									
> 035459528	De La Cruz Ruano	Edgard	001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017									
> 047417609	Estes	Jackson	003	08	7/6/2016	7/6/2016	7/6/2016	System	1/27/2017									
> 049910278	Bax	Kristofer	001	12	8/5/2016	8/5/2016	8/5/2016	System	1/27/2017									
> 025101478	Klebsch	Skyler	001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017									
> 035348615	Metzinger	Jace	001	10	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017									
> 028913792	Fahrni	Michael	001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017									
> 040887615	Aldinger	Brooke	099	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017									

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[illegible]

Notification Letters

- ▶ System -> Sites and Users-> SFAs
 - Official tab

Student Eligibility **System**

Sites and Users

Users
Roles
SFAs
Sites

Administration
Support Cases
Configuration
Data Exchange

SFA Details:

Set Up General Info **Officials** Sites Users

This information is used to populate letters. Blank fields may impact readability.

Child Nutrition Director

Title: Director of Food Service Email: [Redacted]

User ID: [Redacted] Salutation: --Select--

First Name: [Redacted] Last Name: [Redacted]

Street / PO Box: [Redacted]

City: [Redacted] State: SD Zip: [Redacted]

Phone: [Redacted] Fax: [Redacted]

☐ Determining Official

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Notification Letters

- ▶ Official tab – Determining Official

Determining Official

Title: Business Manager Email: [Redacted]

User Name: [Redacted] Salutation: --Select--

First Name: Jim Last Name: Johnson

Street / PO Box: [Redacted]

Address2: [Redacted]

City: [Redacted] State: SD Zip: [Redacted]

Phone: (605) 555-5555 Fax: [Redacted]

Save

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New Match Notification Email

From: IMATCH@state.sd.us <IMATCH@state.sd.us>
 Sent: Friday, January 20, 2017 2:03 PM
 To: [REDACTED]
 Subject: New Direct Approval Matches for 1/20/2017

Good Afternoon,

You have new Direct Approval matches that are ready to be notified. They can be found by following this path: *Student Eligibility* >> *Administration* >> *DC Matching*: Click the previously matched tab, and then check the Exclude Previously Notified Students checkbox.

Have a great day!

Student Eligibility → Administration → DC Matching → Matched tab

DC Matching

Potential Matches | Sibling Search | **Matched** | File Search

Academic Year [REDACTED]

Site Code: -- All -- | Site: -- All --

SSN / Student ID: [REDACTED] | Last Name: [REDACTED] | First Name: [REDACTED] | Grade: --All-- | Status: Active

Case Number: [REDACTED] | Match Date From: [REDACTED] | Match Date To: [REDACTED] | Match Method: ☒ System ☒ Sibling ☒ Manual ☒ Transfers

Apply | Reset

Add a one-day buffer in the 'From' date range

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Eligibility Hierarchy

- iMATCH identifies the hierarchy of direct certification benefits
- SNAP > TANF
- Supersede to direct certification – highest form of direct certification is SNAP

Patrons → Students → search for a student → click on the Student ID

Student Eligibility | System

Applications | Administration | Direct Approvals | DC Matching | Grace Period Letters | **Patrons** | **Students**

Students

Site Code: --ALL-- | Site: --ALL-- | Grade: --ALL--

☒ Student ID/SSN | ☐ PIN | ☐ State ID

Last Name: [REDACTED] | First Name: [REDACTED]

Student ID/SSN: [REDACTED] | Birth Date: [REDACTED] | Status: Active

Apply | Reset

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Direct Certification List

– Daily Change using Date Range

DC Matching

Sibling Search Potential Matches **Matched** File Search

Academic Year: 2016 - 2017

Site Code: -- All -- Site: -- All --

SSN / Student ID: Last Name: First Name: Grade: --All-- Status: Active

From: 1 To: 2 Match Method: ☒ System ☒ Sibling ☒ Manual ☒ Transfers

Apply 3 Reset

Matched Students ☐ Exclude Previously Notified Students ☐ Exclude Previously Free Students

ID	Last Name	First Name	Site	Grade	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print
----	-----------	------------	------	-------	-----------	------------	----------------	--------------	-------------	-------	-------

Student Eligibility → Administration → Matching

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Direct Certification List

► Column Sorting

Matched Students

☐ Exclude Previously Notified Students
 ☐ Exclude Previously Free Students

	ID	Last Name	First Name	Site	Grade	Match Date	Effective Date	Match Method
>				001	12	7/1/2016	7/1/2016	System
>				001	12	7/1/2016	7/1/2016	System

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Direct Certification by Site

Student Eligibility → Administration → DC Matching → Matched tab

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Direct Certification by Site

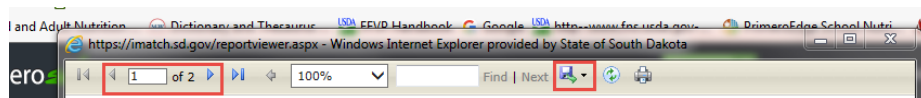
- ▶ Student Eligibility
- ▶ Eligibility Reports
 - Eligibility (uncheck Paid, Reduced)
 - Reason (uncheck Default, Denied)

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Direct Certification by Site

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Direct Certification by Site



- Arrows allow user to page through to additional students, or additional sites
- Floppy disk Save icon allows users to save file as Excel
 - Saving as Excel features each site to display as a different tab in Excel

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Potential Matches

- ▶ Student Eligibility
- ▶ DC Matching
- ▶ Potential Matches

Student Eligibility System

Applications

Notify

Administration

Direct Approvals

DC Matching

Grace Period Letters

Patrons

Application Reports

Eligibility Reports

DC Matching

Sibling Search Potential Matches Matched File Search

Student Details

Last Name: First Name:

ID: Birth Date: / /

Probability

☒ High

☐ Medium

Compare Status

☒ Not Reviewed

☐ Reviewed

Reset

Apply

Potential Match Details

PrimerEdge Student Details				Certification File Details				
Student ID	Last Name	First Name	Birth Date	ID on File	Last Name	First Name	Birth Date	Probability
No records to display.								

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Potential Matches Reviewing entries

Potential Match Details

PrimerEdge Student Details				Certification File Details				
Student ID	Last Name	First Name	Birth Date	ID on File	Last Name	First Name	Birth Date	Probability
<div>Compare...</div> <div>More...</div>								

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Potential Matches

–Matching
Criteria

–Reviewing
possible match

–Making the
Match

Matching Criteria	Student Details	File Details	Points
SSN			0
Student ID			0
Full Name			22
First and Last Name			0
Last and Middle Name			0
First and Middle Name			0
Last Name			0
First Name			0
DOB			0
Phonetic First Name			0
Phonetic Last Name			0
SOUNDEX First Name			0
SOUNDEX Last Name			0
Modified First Name			0
Modified Last Name			0
Name Twist Full Name			0
Name Twist First and Last Name			0
Variable DOB (±10 day(s))			0
DOB Month Year Twist			0
Street Address			0
Guardian			6
Phone 1			0
Phone 2			0
County Code(s)	Brown	Brown	12
Total - 40 (High)			
			21



Match

Mark as Reviewed

Close

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File Search

- ▶ Student Eligibility
- ▶ Administration
- ▶ DC Matching
- ▶ File Search

DC Matching

Potential Matches Sibling Search Matched File Search

Search By

☐ SSN and Birth Date
 ☐ Name and Birth Date
 ☒ Case Number

Details

Case Number 1

Reset 2

Apply

File Details

PrimerEdge Student Details	Certification File Details						
Match Card	ID on File	Last Name	First Name	Birth Date	Case Number	DC Type	File Date
3	4						

View Details...

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Manual Match from File Search

DC Matching

Potential Matches Sibling Search Matched File Search

Search By

☐ SSN and Birth Date
 ☐ Name and Birth Date
 ☒ Case Number

Details
Case Number

Reset
Apply

File Details

PrimerEdge Student Details		Certification File Details					
Match Card	ID on File	Last Name	First Name	Birth Date	Case Number	DC Type	File Date
...	View Details...						

PrimerEdge - Lookup

Site Code: --ALL-- Site: --ALL-- Grade: --ALL--

☒ Student ID/SSN
 ☐ PIN
 ☐ State ID

Last Name: First Name:

ID/SSN: Birth Date: Status: Active

Search

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Manual Match from File Search

Name	Student ID/SSN	Site Name	Grade	Homeroom	Birth Date
>					

File Details

PrimerEdge Student Details	
Match Card	ID on File
...	View Details...

Matching Criteria

SSN
 Student ID
 Full Name
 First and Last Name
 Last and Middle Name
 First and Middle Name
 Last Name
 First Name
 DOB
 Phonetic First Name
 Phonetic Last Name
 SOUNDEX First Name
 SOUNDEX Last Name
 Modified First Name
 Modified Last Name
 Name Twist Full Name
 Name Twist First and Last Name
 Variable DOB (±10 day(s))
 DOB Month Year Twist
 Street Address
 Guardian
 Phone 1
 Phone 2
 County Code(s)

Match Close

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Thank you!

- ▶ CANS Office: 605-773-3413
- ▶ CANS Email: DOE.SchoolLunch@state.sd.us
- ▶ PrimeroEdge Customer Support:
1-866-442-6030
- ▶ PrimeroEdge Email:
support@primeroedge.com

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iMATCH 2017

This training credits for 20 minutes of training in
Key Area 3 Administration
3120 Direct Certification

Your Name:

Date of Training: